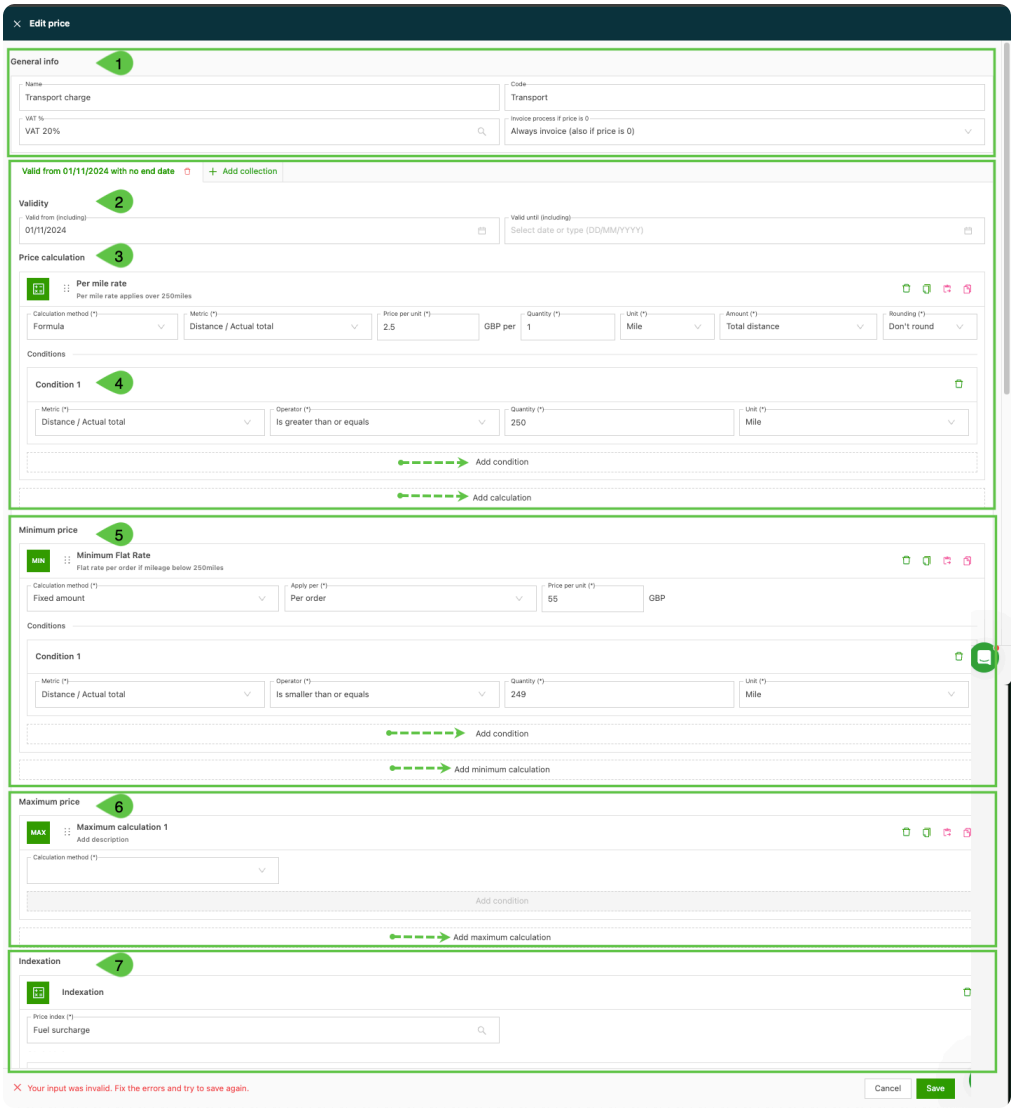
Rate card: Edit price screen overview

This article provides an overview of the fields on the Edit price screen that must be completed when setting up or editing a new price list.

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When setting up a new price list, several fields must be completed. Below is a summary of the fields on the ***'Edit price'*** page.



1. **General info.**
    - Name: Name of the charge that appears on the invoice
    - Code: GL code associated with the accounting package
    - Tax%: Tax percentage to apply (if applicable)
    - Invoice process if price is 0: Option to select whether this charge type appears as a line item on the invoice if no value is present.
2. **<u>Validity / collections tabs.</u>** This is where the individual rating metrics are added. Each collection has validity dates applied. If no date is entered, the dates default to start on the date the details are saved, with no end date. Collections can be entered for multiple dates. This is particularly useful for rates that need regular updates.

3. **Price calculation.** These fields are where the individual rating metrics are entered. Multiple calculations are available, and each can be named, with a description for easy identification.

4. **Conditions.**These can be applied to calculations if specific conditions need to be taken into account. For example, if rating is tiered by distance, multiple distance calculations can be configured, using a mileage condition to segment them.

5. **Minimum price.** A minimum price can be set. Again, this can be paired with conditions to accommodate specific circumstances. For example, standard rating may be based on mileage, but a default minimum is required if the mileage is below a specific threshold.

6. **Maximum price.** Similarly, a maximum price can be set when specific conditions are in place. For example, rating may be per package type but capped at a set price, regardless of how many package types are included.

7. **Indexation.** These can be additional rates included in the rating, for example a fuel surcharge. They are set up in a separate table and are typically based on a percentage rate.